



Quick Reference Guide

Outlook 2013 for Windows

Outlook Data Management



There are ramifications for having a “Large” Outlook mailbox and/or “Large” Outlook main folders. You may experience slow response time when opening Outlook, performance issues such as slow sorting or searching, and the inability to send e-mail if the mailbox size quota is reached. The larger the number of items in a folder (Inbox, Sent Items, Deleted Items, Calendar, etc.), the greater chance Outlook will send multiple requests to the server if the view is changed or the messages are scrolled through.

Mailbox Size and Maximum Number of Folder Items Quotas

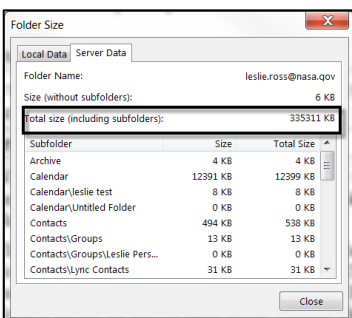
When discussing the size of a user’s Outlook mailbox, we are referring to the folders on the Exchange Outlook Server in your user account, not files stored on your local computer or in a personal storage file.

Mailbox Size: 1 GB Quota

- If the mailbox size reaches **990MB**, the user will receive notifications the mailbox byte count needs to be decreased.
- If the mailbox size reaches **1 GB**, the user can still receive e-mail messages but cannot send e-mail messages.

Check Size of Mailbox

1. Right click on your mailbox in the Folder List *Navigation*. A shortcut menu displays.
2. Click **Properties**. The *Outlook Today Properties* display.
3. Click the **Folder Size** button. The *Folder Size* dialog box displays (shown below).



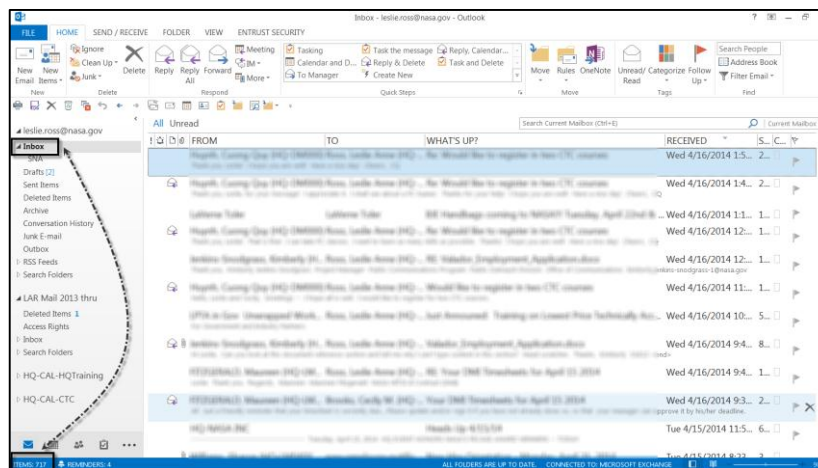
4. Click the **Server Data** tab. The Total size of your mailbox displays as indicated above.

Folder Items: 10,000 Items Quota

- When a main folder reaches the maximum, user will receive automatic notifications from the Outlook server that a folder contains too many items in it.
- The maximum of **10,000 items** includes all of the main folders with all their subfolders and contents. The maximum number of items in any of the main Outlook folders should be below **5,000** items. Ideally, the number should be around **3,500** items or less for optimum performance

Check Number of Items in a Folder

1. Highlight the folder in the Folder List *Navigation* (shown below).
2. The Number of items displays at the bottom.



Create Personal Storage Files (.PSTs)

A **.pst** file can be created with unique folders and subfolders to your preferences. There are differences between an **Archive** and a **.pst** file. An Archive exactly mirrors the mailbox, has all the same folders, and the AutoArchive processing, when enabled, automatically moves messages based on the AutoArchive settings. A **.pst** file, on the other hand, is manually maintained by the user, is more flexible in design and can be customized to user preferences.



For software training, contact the Computer Training Center (CTC) at 358-1111 or visit the CTC Web site at <http://itcd.hq.nasa.gov/ctc>.

Very large .pst files can become corrupt. Using multiple .pst files for unique projects or by year is recommended.

1. Click **Home | New Items | More Items | Outlook Data File**. The *Create or Open Outlook Data File* window displays (shown right).

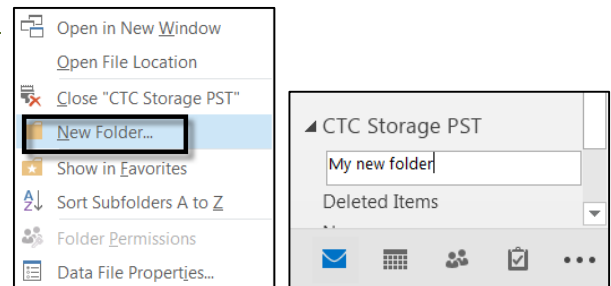
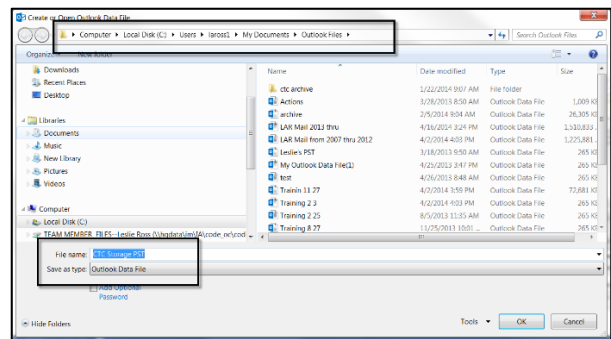
The Default Save location for PSTs in Outlook 2013 is c:\[user's name]\My Documents\Outlook Files.

2. In the **File name** field, type the .pst file name and then click **OK**. The new .pst file appears in the Folder List Navigation.

Personal Folders are not accessible through Webmail (OWA).

Create .PST File Subfolders

1. In the Folder List Navigation, right-click on the .pst file and click **New Folder** (shown near right). A *New Folder* field displays in the Folder List (shown far right).
2. In the field provided, type a name for the new .pst subfolder.
3. Click **OK**. The new subfolder will be created and visible in the Folder List Navigation.
4. Click the **triangle** in front of the .pst file to display the subfolder.



Move Data Methods

- Click your mouse on the item to be moved and hold your mouse as you move it to the new location. Release your mouse to drop the item in the new folder location (this method is referred to as “drag and drop”).

To select multiple items, press CONTROL as you click each item to be moved OR click on the first item to be moved and hold SHIFT as you click on the last item to select a group. To copy instead of move the items, hold CONTROL as you click and drag the items to the new folder location.

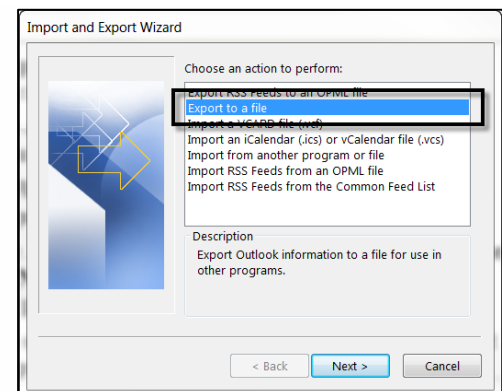
- Right-click the item and select **Move** from the shortcut menu. (This is the only way to move an e-mail message while it is open.) A list of most recently used folders displays. Select the desired folder if listed. If the desired folder is not listed, click **Other Folder**. The *Move Items* dialog box displays. Select the correct folder location in the **Move the selected items to the folder** list and then click **OK**.
- Create rules to move items automatically. (For more Information, documentation on Rules and Filters is available at <http://nomadinternal.nasa.gov/nomad/documentation.html>).

Backup .PST Files by Exporting

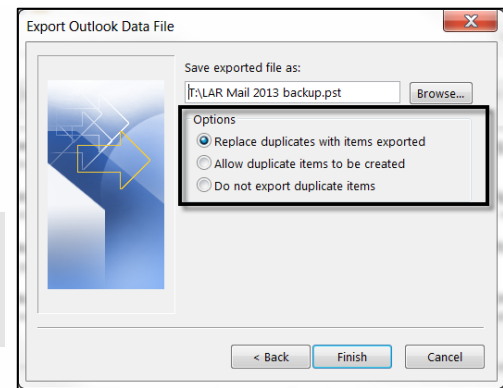
Once an Outlook item is moved to a .pst file, it is no longer backed up on the Outlook servers; it is, however, backed up by Autonomy ConnectedBackupPC. If you would like to import the .pst file to use in another e-mail client or another computer, you need to backup the .pst file. Most importantly, damaged or lost .pst files are not recoverable, therefore, it is strongly recommended that you manually backup your .pst file on a regular basis. The length of time it takes for the backup to complete is dependent on the size of the file and the frequency with which you backup.

Export .PST Files

1. Click **File | Open & Export | Import/Export**. The *Import and Export* wizard begins (shown right).
2. Select **Export to a file** and click **Next**. The *Export to a file* window displays prompting you to select the file type.
3. Select **Outlook Data File (.pst)**. Click **Next**. The *Export Outlook Data File* window displays prompting you to select the folder to export from.
4. Scroll to and select the .pst file and click the **Include Subfolders** checkbox if desired. Then click **Next**. The *Export Outlook Data File* window displays (shown top of next page) prompting you to enter a file name and location.
5. Specify the location to save your .pst file backup. It is recommended that you save the backup .pst file to your **T:drive**.



6. Select the option for handling duplicate items (shown right). As you will need to backup on a regular basis, it is recommend you overwrite the previous backup file. In order to ensure there are no duplicate items in the backup file, select “**Replace duplicates with items exported.**” Click **Finish**. You will be prompted to password protect the backup .pst.
7. Select the desired password protection.



*As the recommended backup .pst file storage location is your **T:\drive** on the **server** (see step 5 above), a password is unnecessary. If you create a password and then forget the password, you will not be able to access the backup .pst file in the future.*

8. Click **OK** to begin the export process.

While the export is running, you will not be able to do anything in Outlook until it completes.

Open .PST Backup Files

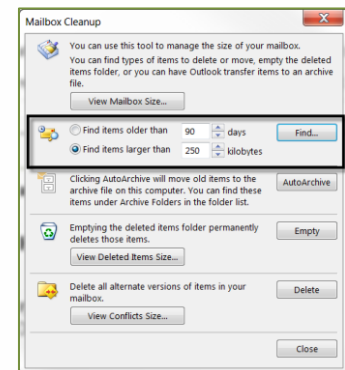
Opening a .pst backup file from the network file share (T:\drive) could corrupt the backup file and you could lose data. If you need to open the file in Outlook, copy it to: **C:\Users\YourUserName\My Documents\Outlook Files**.

1. Click **File | Open & Export | Open Outlook Data File**. The *Open Outlook Data File* window displays.
2. Select the .pst backup file and click **OK**. The .pst backup file displays in the *Folder List Navigation*.

Search for Items to Delete or Move

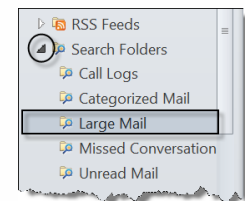
Search Older/Larger Items

1. Click **File | Info | Cleanup Tools | Mailbox Cleanup**. The *Mailbox Cleanup* dialog box displays (shown right).
2. Select either **Find items older than () days** or **Find items larger than () kilobytes**.
3. Enter the value of days or kilobytes.
4. Click **Find**. The *Advanced Find* window displays with a search result (shown below in the section entitled “Work with Advanced Find Options”).



Use Search Folders to find Large E-mail

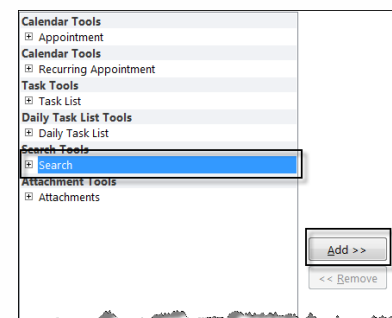
1. From the *Folder List Navigation*, click the **triangle** beside **Search Folders** to expand the view. A number of **Outlook saved searches** display.
2. Click **Large Mail**. Outlook runs a saved search and displays mail throughout all your subfolders sorted by size categories: **Enormous, Huge, Large** and **Very Large**.
3. Large messages can then be reviewed, deleted or moved to an **archive** or .pst file.



Use Outlook Search Tools

The **Search Ribbon** is a **Tools Tab** that is contextual and displays whenever you run a search. You can enable the tab to display all the time.

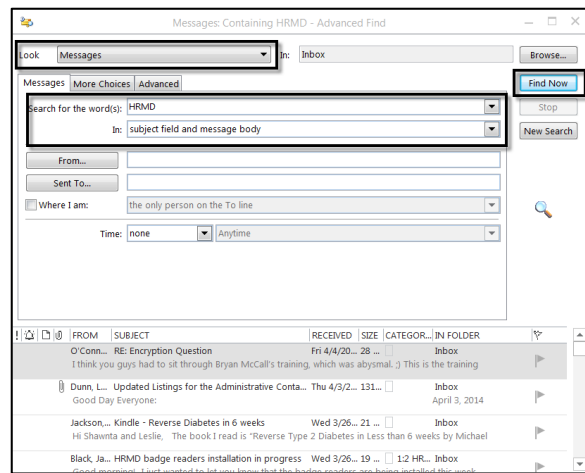
1. Click **File | Options | Customize Ribbon**.
2. In the **Choose commands from** drop-down list, select **Tool Tabs** and select the **Search Tools** tab.
3. In the **Customize the Ribbon** drop-down list, select **Main Tabs**.
4. Click **Add**. The **Search Tools** will display in the **Main Tabs** list to the right.
5. Enable the ribbon by clicking the **Search** checkbox. This will enable the **Search Tab** to be available regardless of the context.
6. Click **OK** to dismiss the *Options* window.



Work with Advanced Find Options

1. Click **Search Tools Tab | Search Tools | Advanced Find**. You can also use the shortcut keystroke **CTRL + SHIFT + F**. The *Advanced Find* window displays (shown right).
2. Select the type of item you are looking for in the **Look** field drop-down list. You can search for **Appointments and Meetings, Contacts, Messages, Notes**, or **any type of Outlook item**.
3. Click **Browse** to select the folders to include in your search. The *Select Folders* dialog box displays.

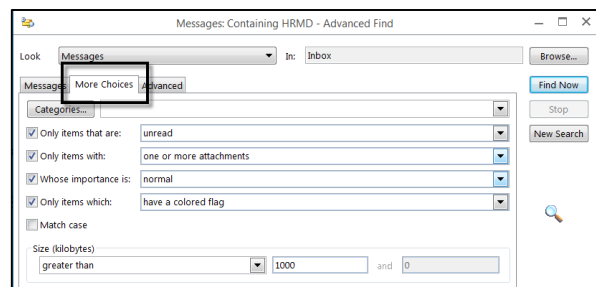
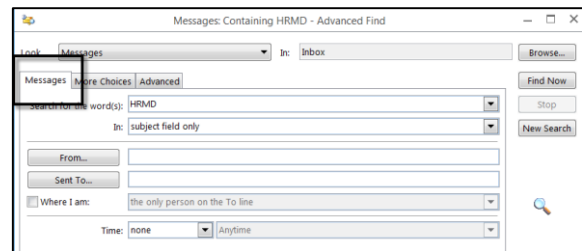
You can search your mailbox, Archive or .pst files if they are open in your Outlook Folder List in the Navigation. However, you can only search folders from one data file at a time.



4. Click the **Search subfolders checkbox** to search within a group of nested folders. Otherwise, click to select the **checkbox** for each folder separately.
5. Click **OK**. The *Advanced Find* window displays again with the **In** field displaying the selected search folders.

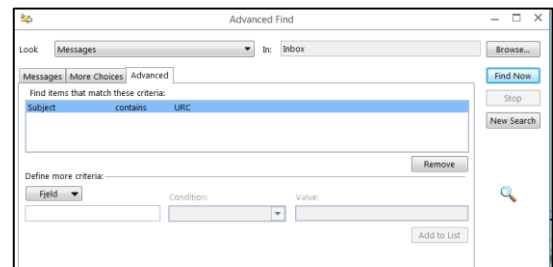
Depending on what you are looking for (Appointments and Meetings, Contacts, Messages, Notes, or any type of Outlook item), the first search tab is contextual and will reflect what you are looking for. If you are looking for Messages, then the first tab will provide options to search for E-mail. If you are looking for Contacts, then the first tab will provide options to search for Contacts. The following is an example of searching for E-mail messages.

6. On the **Messages Tab** (shown right), enter your search criteria:
 - In the **Search for the word(s)** field, type the search keyword(s).
 - In the **In** field, select **subject field only** or **subject field and message body**.
 - Click **From** to select the sender from either the **Outlook address book** or your **personal contacts**. You can select multiple people.
 - Click **Sent To** and select the recipient from either the **Outlook address book** or your **personal contacts**. You can select multiple people.
 - Click the **Where I am** checkbox to enable the field, and click the **drop-down arrow** to select **the only person on the To line, on the To line with other people, or on the CC line with other people**.
 - Click the **Time** drop-down arrow to select from the list provided. Options include the **time received, sent, due, expires, created** or **modified**.
 - Once a time criteria is designated, click the **drop-down arrow** in the field to select from the list provided. Options include **Anytime, Yesterday, Today, In the last 7 days, Last/this week, or Last/this Month**.
7. On the **More Choices Tab** (shown right), click **Categories** to select a category to search by.
8. Enable one of the following conditions as appropriate:
 - Only items that are either **read** or **unread**.
 - Only items with either **one or more attachment**, or **no attachments**.
 - Where importance is either **normal, high** or **low**.
 - Only items which are **marked completed, are flagged by someone else, have no flag or are flagged by me**.
 - In the **Size** section, select from the options provided and then enter the size limitations in the two size fields.



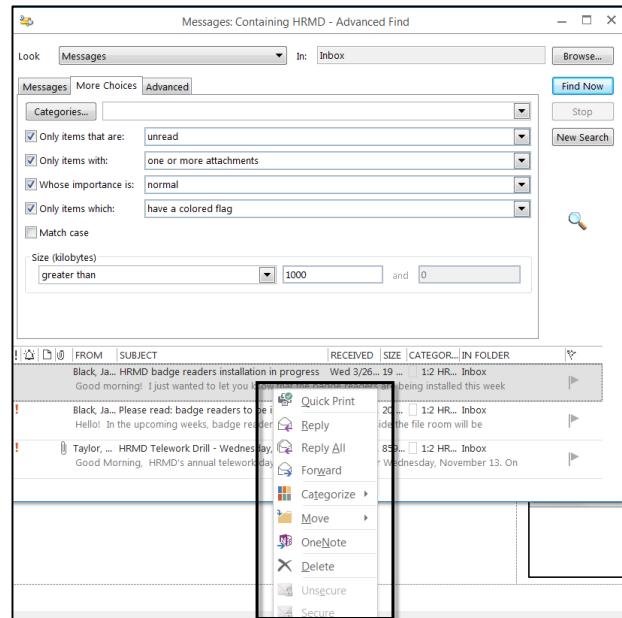
9. On the **Advanced Tab** (shown right), create a conditional search using multiple search criteria as follows:

- Click the **Field** drop-down and select the field **type** and **specific field** to search within.
- In the **Condition** field, select the conditional search **operator**. Options includes **contains**, **is (exactly)**, **doesn't contain**, **is empty**, and **is not empty**.
- In the **Value** field, enter the text to be searched.



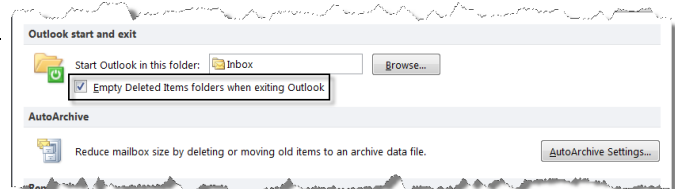
- Click **Add to List** to add the search criteria into the list box.
 - Follow the steps above to continue creating conditional search criteria as appropriate.
 - Click **Remove** to delete conditional search criteria.
10. Click **Find Now** to run the search. Once the search completes, the *Advanced Find* dialog box displays all messages that meet the search criteria (shown right).

From the list box, right-click on a message to display a Shortcut Menu with options to Quick Print, Reply, Reply All, Forward, Categorize, Move, Delete or Secure.



Automatically Empty Deleted Items

- Click **File | Options | Advanced**. The *Outlook Advanced Setting* options display.
- In the **Outlook start and exit** section (shown right), select **Empty Deleted Items folders when exiting Outlook**.



Access the Recoverable Items

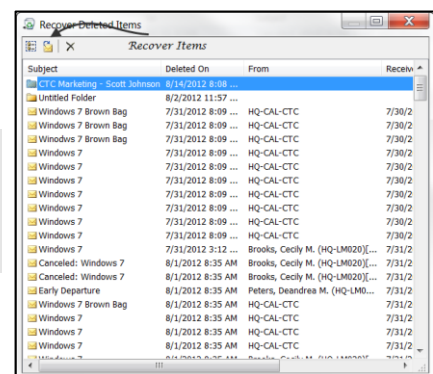
If you delete an item and need to restore it to your mailbox, it is available in the **Recover Deleted Items** list.

The Recoverable Items are stored for a period of two weeks after the deletion date.

Display the Recover Deleted Items Folder

- Display the **Deleted** Items folder.
- Click **Folder | Recover Deleted Items**. The *Recover Deleted Items* window displays (shown right).
- Select items to be recovered. Multi-select by pressing **SHIFT + click** for contiguous items or **CTRL + click** for non-contiguous items.
- Click **Recover Selected Items** to restore the messages to your Deleted Items folder.

*Clicking **Delete** in the Recover Deleted Items Folder will permanently delete the item from the Outlook server.*



*You can also click the **Select All** icon.*

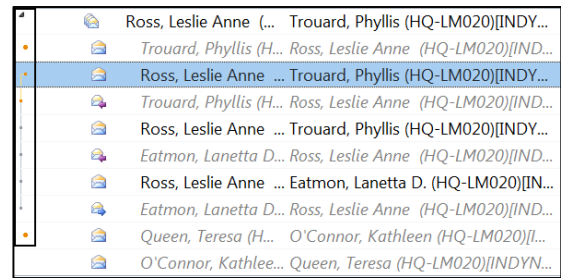


Use Outlook 2013 Clean Up Tools

A conversation or e-mail thread is a chain of e-mail messages with the same subject. Any messages that are duplicated within a later message are considered redundant. **Conversation Clean Up** evaluates each message in a conversation or message thread. Any messages duplicated within a later message are moved to the **Deleted Items** folder. This clean up can be performed on your inbox, a specific mail folder alone or a folder with its subfolders.

View E-mail Conversations

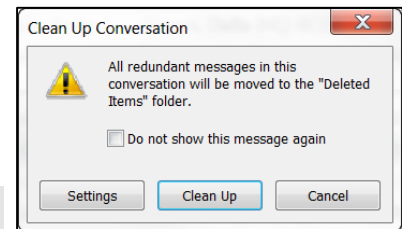
1. Display the folder containing the conversations to be viewed.
2. Click the **View Tab | Show as Conversations**. You will be prompted to apply the view to **All mailboxes**, **This folders** or to **Cancel**.
3. Select the appropriate action. The folder(s) display with **triangle** icons beside the most recent message and all previous messages are grouped below it regardless of the folder they are in.



Clean Up by Conversation

1. Highlight the latest message in a conversation.
2. Click the **Home Tab | Clean Up drop-down arrow | Clean Up Conversation**. Or Right-click on the message and select **Clean Up Conversation**. The *Clean Up Conversation* dialog box displays (shown right).

You can access the Clean Up Options by clicking Settings on the Clean Up Conversation dialog box.

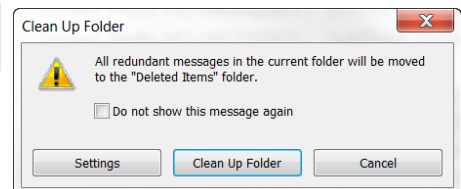


3. Click **Clean Up**. You will be prompted that all redundant messages in this conversation will be moved to the **Deleted Items** folder.
4. Click **OK**. Any messages that are duplicated within a later message will be deleted.

Clean Up by Folder

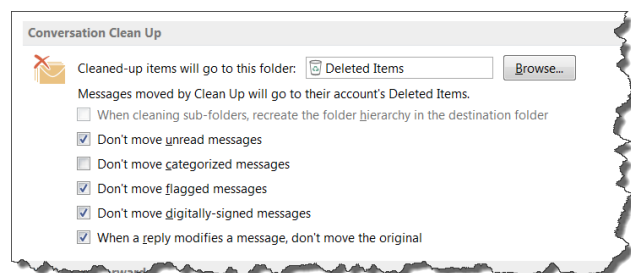
1. Click the **Home Tab | Clean Up drop-down arrow | Clean Up Folder** or **Clean Up Folder and its Subfolders**. The *Clean Up Folder* dialog box displays (shown right).

You can access the Clean Up options by clicking Settings on the Clean Up Folder dialog box.



Conversation Clean Up Options

1. To access the options, click **Settings** on the **Clean Up** dialog box.
2. OR do the following:
 - a. Click the **File Tab | Options | Mail**. Scroll down to the **Conversation Clean Up** option settings (shown right).
 - b. Click **Browse** to select the folder for cleaned-up items to be moved to.
3. Select from the additional options below:
 - Enable/disable **When cleaning sub-folders, recreate the folder hierarchy in the destination folder**.
 - Enable/disable **Don't move unread messages** by clicking the checkbox.
 - Enable/disable **Don't move categorized messages** by clicking the checkbox.
 - Enable/disable **Don't move flagged messages** by clicking the checkbox.
 - Enable/disable **Don't move digitally-signed messages** by clicking the checkbox.
 - Enable/disable **When a reply modifies a message don't move the original** by clicking the checkbox.
4. Make your setting selections and click **OK**.



Work with Archives

An Archive file is a type of Outlook Data File (.pst). The first time the AutoArchive runs, the Archive file is automatically created.

Archived Folders are not accessible through Webmail or SNA.

If you choose to have items deleted, they are not archived. If you choose to have items archived, they cannot be deleted by an AutoArchive. Once items are archived, they can only be deleted manually.

Create Archive File through File Options

1. Click **File | Options | Advanced | AutoArchive Settings**. The *AutoArchive* dialog box displays (shown right).
2. Select the checkbox for “**Run AutoArchive every [enter value] days.**” Once selected, the other options become available.
3. Choose how often AutoArchive runs.

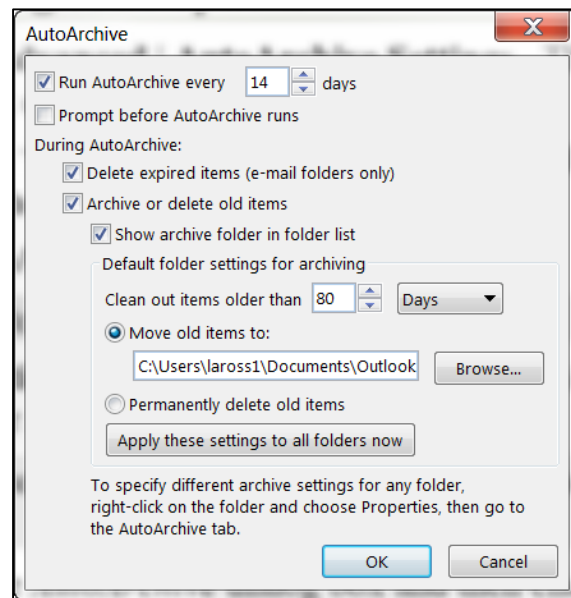
It is highly recommended to set the interval to 14 days.

4. Click “**Apply these settings to all folders now**” to run the AutoArchive process immediately for all folders in your mailbox.

If you want to set up unique archive options at the folder level do not click this button.

5. Click **OK** to dismiss the *AutoArchive* dialog box and then click **OK** to dismiss the *Outlook Options* window. The AutoArchive process will run based on your selected settings.

You can also set up these settings by folder. Simply right-click on the appropriate folder in the Folder List Navigation, and click the AutoArchive tab. The same settings will be available.



Official NOMAD training materials and documentation are available at:

<http://nomad.nasa.gov/nomad/documentation.html>

Help Desk and Center Outreach contact information is available at:

<http://nomad.nasa.gov/nomad/nomadoutreach.html>

For software training, contact the Computer Training Center (CTC) at 358-1111
or visit the CTC Web site at <http://itcd.hq.nasa.gov/ctc>